

**Everything You Ever  
Wanted to Know  
About Coalitions\*  
(\* But were afraid to ask!)**

**Montana Breast and Cervical  
Health Program  
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## **Chapter 1**

What is a coalition and why do we need one?

- Coalition is a broad term and encompasses a variety of ways in which groups of community organizations and stakeholders join together to address a common concern or achieve a common goal.

How do I recruit community organizations and stakeholders for the coalition?

- There are many ways to recruit to build a solid foundation for a coalition. The American Cancer Society has a proven track record of coalition development and uses the **P**reparation, **P**lanning, **R**ecruitment, and **R**etention method.
  - **Preparation** – Answer questions about why there is a need for this coalition and volunteers for it. Is it to address social change and health promotion within the community? What does the coalition need this volunteer for? For the purposes of this workbook, raising awareness about cancer screening, educating women, bringing women into screening and motivating women to change their behavior are the reasons to develop this coalition. It is very helpful to analyze volunteer trends within your community to ascertain the types of volunteers and volunteer positions that are in demand in your area. In general terms, volunteers today are looking for specific volunteer opportunities; they want them to have a beginning, middle and end. Short-term volunteer commitments are more popular now than in the past. Volunteers also are searching for an opportunity to volunteer at something that offers concrete achievements and tangible results.
  - **Planning** – Assessing the needs of the coalition is an important planning process when recruiting for coalition members. What areas of strength does the coalition have? What are the coalition's weak areas? What types of people would complement both the strong and weak areas in the coalition? Remember, the people that are being targeted for recruitment do not have to meet or complement both of those areas for the coalition. It will be more likely that a specific volunteer targeted for recruitment will meet one need the coalition has, not all of them. This stage in developing the coalition also includes developing a job description for the coalition position and a formal invitation to join the coalition. It is always a good idea to determine the length of commitment for coalition members and to

include that in the job description. A sample job description and formal invitation to join the coalition are in the Appendix. Remember when writing the job description that it should be mutually beneficial for all parties and should not require more than ten minutes to develop; if it takes longer than that, simplify it! Well-written job descriptions will predict the level of volunteer retention. When writing the job description ask the following questions;

- Who can do this job?
- What is the job?
- Where can I find them?

Another important part of the planning phase is to rehearse your presentation asking community leaders to join the coalition. As with anything, practice makes perfect. *'Proper planning prevents poor performance'* is a mantra that can serve on many varied occasions and never fails. When meeting with prospective coalition members, always provide them with a job description, personalize the interview in some fashion and show up early or on time.

- **R**ecruitment – It is very helpful to develop a recruitment plan when searching for new coalition members. A list of prior volunteers can be a useful part of the recruitment plan. Former volunteers may be interested in volunteering again, especially if they had a positive experience the first time. The list of former volunteers can also be an excellent starting place to gain other community leaders names or places they are at. The most important part of the recruitment plan is to use targeted marketing to gain the right members for your coalition. The *'Four C's'* method uses an easy formula to develop a targeted marketing plan. The *'Four C's'* can also be useful when developing job descriptions.
  - **C**ustomer value – What does the volunteer get out of this opportunity?
  - **C**osts – How long of a commitment is this job? How many hours per week/month?
  - **C**ommunication – What is the most effective way to reach the targeted volunteers?

- **C**onvenience – How can we make this volunteer position easy and attractive for the volunteer to participate in?

When coalitions are already in place, the same concepts also apply to improve, diversify and motivate lethargic coalitions to become empowered, active and instruments of change for the community. It is a good idea to establish a recruitment committee as an ongoing workgroup of the coalition.

When calling on prospective coalition members one tried and true strategy is to use the buddy system. Bring someone with you that has a personal and/or professional relationship with the candidate. Practice asking the candidate to join the coalition; here is a list of what to include when asking a new community member to join the coalition.

- Personalize the introductory information
- Show your commitment to the cause
- Provide information on the position
- Emphasize the benefits of the position
- Acknowledge the barriers
- Provide positive feedback about the candidates abilities
- Emphasize support for the position
- Provide incentives

On some occasions, cold calling prospective coalition candidates cannot be avoided. Practice with a mentor on your proposal delivery. Emphasize the candidates match with the coalition mission. Emphasize the candidates' readiness for the commitment; if now is not a good time, perhaps later would work better, don't close the door. And don't forget to acknowledge how precious and valuable the candidates' time is in connection to the project.

- **R**etention – Volunteer retention is all about cultivating a relationship with the volunteer. Team building and relationship building principles and concepts apply to this aspect of coalition management. Coalition leaders and members need to spend time with the new member getting to know them. The new member needs to feel acknowledged as a valuable asset to the coalition and the coalition needs to be flexible with the length of the commitment. Sometimes episodic volunteers can be brought in to provide a 'fix' to a slumping coalition. Recognition is an important aspect of retention. There are many types of recognition; formal or

informal, tangible or intangible but the recognition needs to be appropriate to the individual volunteer. Research has indicated that public recognition is vital to the majority of volunteers. This can be accomplished by having an annual day of recognition for all of the organization's volunteers.

## **Chapter 2**

OK. Now we have discussed the basics of volunteer recruitment and retention. Let's discuss the organization of a successful coalition.

How can a coalition create community change?

- It allows organizations to become involved in new and broader issues without having the sole responsibility for managing or developing those issues.
- It demonstrates and develops widespread public support for issues, actions or unmet needs.
- It maximizes the power of individuals and groups through joint actions.
- It minimizes duplication of effort and services.
- It improves trust and communication among groups that would normally compete with one another.
- It helps mobilize more talents, resources and approaches to an issue than any single organization could achieve alone.
- Its flexible nature helps it to exploit new resources in changing situations.

How is a healthy, active coalition launched?

Here are some easy steps to follow when launching a new coalition or revamping an existing one!

- **Assemble a core planning group** – Bring together enough of the right people who have a common interest around the issue or need and are willing to meet regularly to plan for their community.
- **Discuss the health problem or needs to be addressed** – Discussions need to produce agreement on the health problems or needs of the community. The group must develop a clear understanding of the issues, and a consensus of the need for action.
- **Clarify the group's mission and priority issues** – Group members need to see themselves working towards a common goal and should be able to describe the mission in a few short words.
- **Identify priority populations and interventions most likely to succeed** – Based on data and collective wisdom, target populations and possible interventions should be discussed. Partners will want to include representatives from the identified audience in the coalition membership.

- **Identify and recruit additional partners** – Consider who else should be at the table and if the group is strong enough with the current members. It is important to recruit representatives from as many segments of the community as possible. Diverse representation will strengthen your planning and implementation. Have current members invite new members to participate.
- **Choose a leader and define member roles** – It is necessary to designate group leadership. Initial leadership should come from the core planning group. The group can also elect co-leaders to divide the leadership role. It is also important to define individual members' jobs. Individual members can be more successful if they are empowered to work on their defined role outside of group settings and make some of their own decisions; for example establishing workgroups within the coalition, i.e. recruitment, outreach, fundraising, etc.
- **Develop a work plan to address priority issues** – As a team, write a work plan to reach your designated audience with the interventions most likely to succeed. The work plan should include specific, measurable objectives. Each objective should then have detailed action steps with a defined timeframe and a member assigned to oversee each action step. The work plan can also list out resources that the coalition will need to obtain, such as funding or materials.
- **Work to build involvement, ownership and consensus** – Active involvement by members is critical. However, it may take some time for team members to get involved and feel connected to the team. Training about health promotion and project goals will help members feel more confident of their participation and decision-making. Work to involve all members and when possible, proceed with group consensus.
- **Implement the work plan through the full partnership, or through designated work groups** – The work plan is a working document for implementing interventions, and can be adapted as needed. If the coalition has a narrowly defined mission, it may work well to plan and implement the work plan as a full group. But if your mission is more broad-based and the partnership has several priority issues, it may be more effective to divide into work groups.

Here is an outline for recommended steps for effective planning:

**Planning Step**

**Prevention Planning Issue**

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|-------------------------------|---|
| ○ Assess Needs:               | What problem does the community need to address?                          |
| ○ Develop Goals:              | What outreach efforts should be achieved in the next several years?       |
| ○ Develop Objectives:         | What measurable results can be achieved in the near future?               |
| ○ Develop Strategies:         | What activities will be implemented to meet program goals and objectives? |
| ○ Identify Resources:         | What resources does the program need to achieve the objectives?           |
| ○ Identify Funding Resources: | Where will the \$\$ come from?  |
| ○ Assign Leadership:          | Who is responsible for each part of the prevention program?               |
| ○ Implement:                  | What procedures will keep the coalition on track?                         |
| ○ Evaluate:                   | How can the coalition determine whether the objectives are met?           |
| ○ Revise:                     | What changes are needed to improve the work plan and/or the coalition?    |

**Provide the coalition enough structure to continue and grow**

Coalitions vary from formal to informal working structures. Some coalitions function better with formalized by-laws and organizational structure. Others function more effectively with an informal structure. Adopt a structure that meets the needs of group members and the task at hand. Do not overlook that a method for maintaining leadership and members will be essential for a coalition to continue and grow.

## Defining Roles and Responsibilities

To move past tokenism into real collaboration, all partners must understand their roles and responsibilities. Unfortunately, there are no universal roles and responsibilities. Each coalition must form its own to suit its needs.

To build trust, all partners within the coalition must present their intentions and agendas honestly and openly. **Diversity of the coalition is a strength!**

- Respect the value of each partner.
- Respect the degree to which organizations can be flexible.
- Recognize that some activities may be dropped in order to collaborate.

Certain leadership traits have been found to be common to successful coalitions. Strongly determined leaders with the ability to seek resources, who know how to recruit the right people, consistently prove to be effective. Resources include human, financial and political support.

Vision, commitment and leadership weave together with the work plan. The action steps within it describe the specifics of who does what, when and how. Each partner within the coalition takes responsibility for specific tasks and makes a commitment to carry them out.

The work plan can make or break the coalition. Barriers include inadequate funding, resistance to involvement by a critical community sector and turf issues. A well-designed work plan addresses these issues.

### **Recurring roles include:**

Leader:	Promotes the vision and direction of coalition
Coach:	Encourages coalition excellence
Trainer:	Coalition skill developer
Model:	Demonstrates appropriate group behavior
Facilitator:	Guides the coalition process
Evaluator:	Appraises coalition results

## **Appendix**

### **Coalition Member Job Description**

#### **MBCHP Health Coalition Member Job Description**

**Position Name:** Coalition Member

**Location:** Teton County Health Department

**Commitment:** Quarterly coalition meetings, monthly workgroup meetings via conference calls.

**Job Skills & Duties:** Commit to attending quarterly meetings, choose workgroup to participate with, provide active feedback on issues surrounding Breast & Cervical health. Assist in developing work plans to develop strategies to recruit eligible women, and fundraising ideas for coalition. Willing to reach consensus on issues, comfortable with group work and experience with strategic planning. Community leadership and entrepreneurial vision desired. Creativity and thinking outside of the box essential. Program marketing, health promotion and evaluation experience also useful. Development and creation of community resources, new partners and expansion plans for program preferred. Willing to train the right applicant.

**Benefits:** Training provided on: coalition development and building, breast and cervical cancer prevalence in MT, fundraising, outreach strategies, consensus building, strategic planning, work plan development, community development, health promotion, social marketing, and other topics as needed. Create a conversation with Montana women about MBCHP eligibility criteria. Opportunity to develop network of like-minded community leaders and the ability to create change in local community. Social networking with like-minded people in various unique cultural communities.

## Membership Invitation

See attached file

## Meeting Rules and Reasons

Effective meetings can move the partnership along faster and lead to greater success.

Key elements	Questions that the meeting leader or planner needs to answer:
1. Purpose	Why meet? What do we wish to achieve?
2. Structure	What type of meeting is needed? Is there an alternative to meeting face-to-face? (ie. telephone meetings or correspondence)
3. Plan/Design	What business will be conducted? What shall the agenda be? What should each agenda item achieve? (e.g., decision, plan, action) What process will be used to handle each agenda item? (e.g., brainstorm, discuss, vote) What is the time limit for the meeting and for each agenda item?
4. Members	Who needs to be there? What viewpoints need to be represented? What roles are important in the meeting?
5. Leadership	What can a formal leader do to ensure an effective, productive meeting? Encouraging personal leadership in meetings—what can members do to ensure effective meetings?
6. Involvement	What will we do to ensure maximum feasible participation in the meeting?
7. Logistics	Where will we meet? How shall we arrange the room? How and when will we notify participants?
8. Supplies	What supplies and/or equipment are needed to effectively run the meeting? Who will locate needed supplies/equipment?
9. Information	What information or materials do members need for effective participation in the meeting?

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|                | When do members need the information and in what form?   |
| 10. Actions    | How can we summarize the outcomes, actions, responsibilities, and next steps for members?<br>What procedures will encourage members to follow through on action items? |
| 11. Record     | How will we record the proceedings?<br>How will we ensure that the record is accurate?<br>Who will record, prepare, and distribute the record of the meeting?          |
| 12. Evaluation | How will the meeting be evaluated?<br>How will the meeting evaluation results be used?   |

### **Unique Partnership Examples in Cancer Early Detection**

- Nebraska's breast and cervical cancer program works with pharmacists and pharmacy students to actively promote mammography as part of their practice.
- The Stop & Shop Companies in eastern US distributes materials from booths in its local pharmacies.
- KMART and Rite Aid Corporation in Michigan distribute coupons and hold promotional events for the breast and cervical cancer program.
- Family Dollar Stores, Inc. donated employee time to a West Virginia screening program to staff booths and distribute information.
- Michigan's breast and cervical cancer screening program partnered with nursing homes across the state to link their employees with local screening services.